

LAST REVISED DATE: 05/01/2017

General Information

Task	Process Information
Creating an eProcurement Requisition	<p>A requisition is created in the eProcurement module for procuring goods/services.</p> <p>NOTE - for AOC, District Court, Circuit Courts, Appellate Courts, and Programs: Per the FY17 Procurement Policy Change, Receipts <u>will no longer be REQUIRED</u> for <u>Services</u> under Corporate POs (POs created by DPCGA). However, receipts are required for all Goods received, and POs created by DPCGA for Goods will be set to Receipt Required. If you have purchases from a vendor for both Goods and Services, please make sure you create separate lines on your Requisition, so separate lines will be created on your PO. If there is any question by DPCGA as to whether the item is considered Goods or Services, the PO will default to Receipt Required. The Line Details on your PO will indicate if receiving is required. If you want Receipts for Services on your PO, please indicate this request on your Requisition.</p>


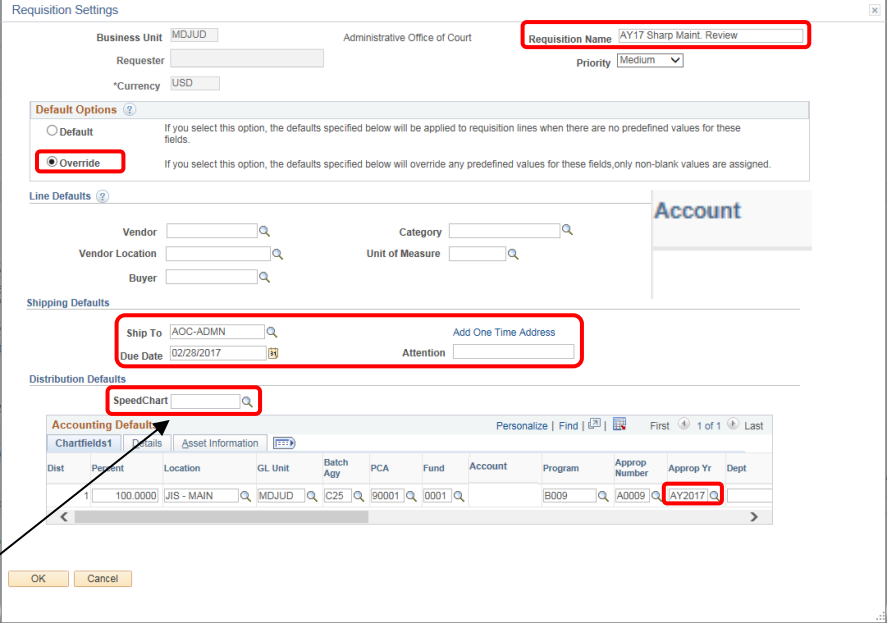
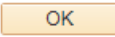
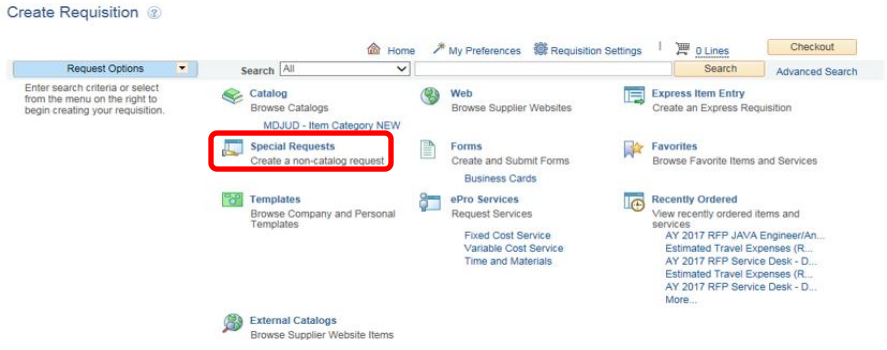
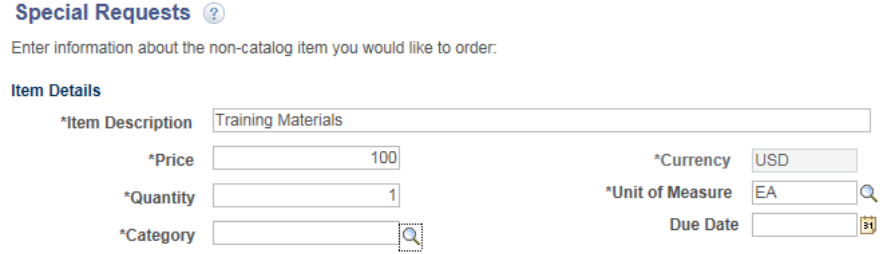
GEARS Navigation


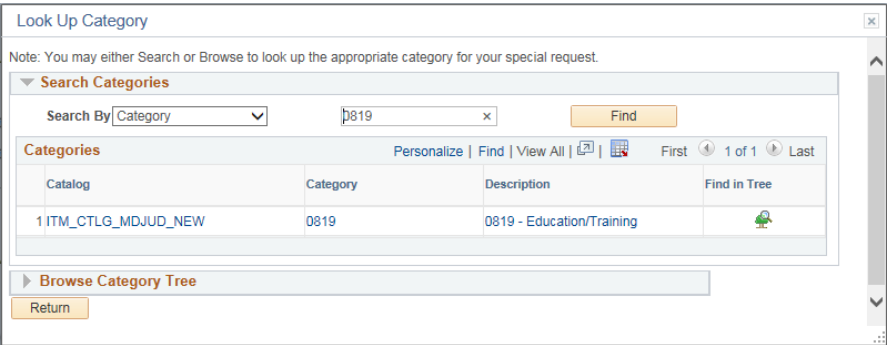
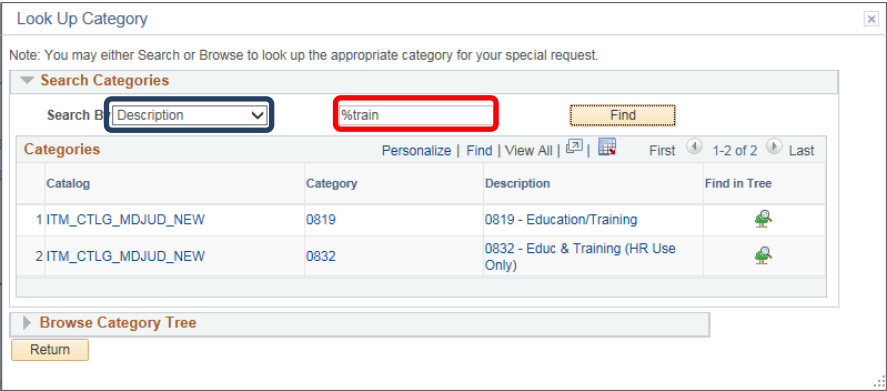



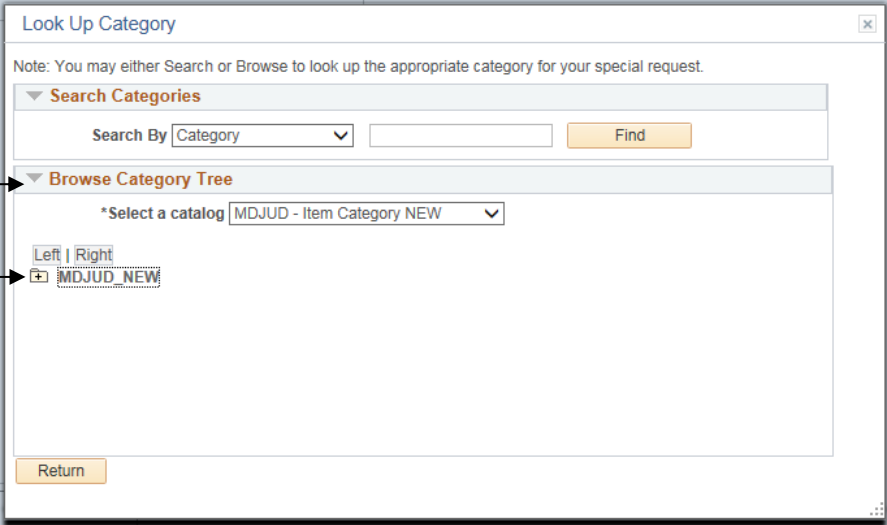
Main Menu > eProcurement > Requisition	
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1.0 Process

This document is intended to provide a quick reference to completing standard transactions within GEARS.


STEP	ACTION	DETAILS
1.	Click on the link Requisition Settings . This is where you'll setup the defaults for your Requisition.	

<p>2.</p>	<p>On the pop-up window that opens, enter your Requisition name.</p> <p>NOTES:</p> <ol style="list-style-type: none"> It is important to give your requisition a meaningful name to make it easier to find later. Be sure to start the Requisition Name with the corresponding AY year. For example, AY17 Adobe Products. Click on the Override radio button. The defaults entered on steps 3 & 4 will populate on <u>ALL</u> your requisition lines. Enter the Ship To, Due Date and Attention fields, if needed. To use the SpeedChart field, you can search for your PCA by using the  feature. Notice that the Account and Approp Yr Chartfields are blank. Enter the Approp Yr and leave the Account blank. 	 <p>Multiple PCA's per line: If you need to divide the expenses on your Req. lines to multiple PCA's on a percentage basis, it can be done on this page. Please contact GEARS support, if you need help with this feature.</p>
<p>3.</p>	<p>Click the  button.</p>	
<p>4.</p>	<p>Click on the link Special Requests.</p>	
<p>5.</p>	<p>Add items and/or services.</p> <p>Fill in all fields marked with an asterisk (Item Description, Price, Quantity, and Unit of Measure).</p> <p>Note: You can search for the Category by selecting the magnifying glass.</p>	

<p>6.</p> <p>6a.</p>	<p>On the Look Up Category screen.</p> <p>Choose either  or  to look up the appropriate category for your requisition.</p> <p>NOTE: Do either 6a or 6b.</p> <p>Note: The category Codes are the same as our existing account codes.</p> <p><i>If you know the appropriate account code for your purchase, you can enter it, as the category code will be the same.</i></p>	<p>You can look up Category by Account #</p>  <p>You can also look up Categories by Description (be sure to change the Search By value to 'Description'). The % before the search keyword will look for the search keyword anywhere within the Description. In this case, the system searches for the word train in all the category descriptions.</p> 
<p>6b.</p>	<p>To </p> <ul style="list-style-type: none"> Expand the section by clicking the  Select a catalog from the dropdown list and click the  to browse the categories within. <p>For example, if the account code to be used on your requisition line is 0819 (Education/Training), you would choose 0819 as the category.</p>	


	<ul style="list-style-type: none"> • Select the row containing the good/service you wish to procure. • Your selection will appear in the Category field on the “Add Items and Services” screen. 	<div> <div>0815 - Laundry</div> <div>0817 - Legal Services</div> <div style="border: 2px solid red; padding: 2px;">0819 - Education/Training</div> <div>0820 - Medical Care</div> <div>0821 - Management Studies & Co</div> </div> <div> Item Details <div> <div>*Item Description</div> <div>Training Materials</div> </div> <div> <div>*Price</div> <div>100</div> </div> <div> <div>*Quantity</div> <div>100</div> </div> <div> <div>*Category</div> <div>0819</div> </div> <div> <div>*Currency</div> <div>USD</div> </div> <div> <div>*Unit of Measure</div> <div>EA</div> </div> <div> <div>Due Date</div> <div></div> </div> </div>																						
7.	Click the Add to Cart button.																							
8.	If you're requesting multiple items, you can continue adding Items to your cart. When you are done adding Items , click on the Checkout button.	<div> <div>Home My Preferences Requisition Settings 1 Line Checkout</div> <div>Search All Search Advanced Search</div> <div> Special Requests <div>Enter information about the non-catalog item you would like to order:</div> </div> <div> Item Details <div> <div>*Item Description</div> <div></div> </div> <div> <div>*Price</div> <div></div> </div> <div> <div>*Quantity</div> <div></div> </div> <div> <div>*Category</div> <div></div> </div> <div> <div>*Currency</div> <div>USD</div> </div> <div> <div>*Unit of Measure</div> <div></div> </div> <div> <div>Due Date</div> <div></div> </div> </div> </div>																						
9.		<div> Checkout - Review and Submit <div>Review the item information and submit the req for approval.</div> <div>My Preferences Requisition Settings</div> </div> <div> Requisition Summary <div> <div>Business Unit</div> <div>MDJUD</div> <div>Administrative Office of Court</div> <div>Requisition Name</div> <div>AY17 Sharp Maint. Review</div> </div> <div> <div>Requester</div> <div>COLLEEN.CANTLER</div> <div>Colleen Cantler</div> <div>Priority</div> <div>Medium</div> </div> <div> <div>*Currency</div> <div>USD</div> </div> </div> <div> Cart Summary: Total Amount 10,000.00 USD <div>Expand lines to review shipping and accounting details</div> <div>Add More Items</div> </div> <div> Requisition Lines <table border="1"> <thead> <tr> <th>Line</th> <th>Description</th> <th>Item ID</th> <th>Vndr Name</th> <th>Quantity</th> <th>UOM</th> <th>Price</th> <th>Total</th> <th>Details</th> <th>Comments</th> <th>Delete</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Training Materials</td> <td></td> <td></td> <td>100.0000</td> <td>Each</td> <td>100.0000</td> <td>10000.00</td> <td></td> <td>Add</td> <td></td> </tr> </tbody> </table> <div> <div>Select All / Deselect All</div> <div>Select lines to:</div> <div>Add to Favorites</div> <div>Add to Template(s)</div> <div>Delete Selected</div> <div>Mass Change</div> </div> <div> <div>Total Amount</div> <div>10,000.00 USD</div> </div> </div>	Line	Description	Item ID	Vndr Name	Quantity	UOM	Price	Total	Details	Comments	Delete	1	Training Materials			100.0000	Each	100.0000	10000.00		Add	
Line	Description	Item ID	Vndr Name	Quantity	UOM	Price	Total	Details	Comments	Delete														
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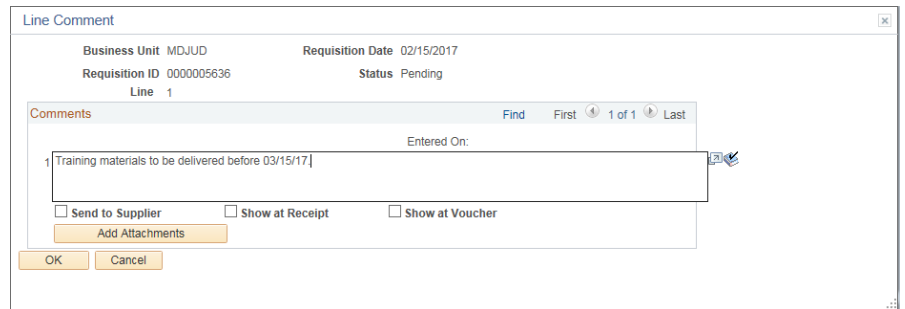
10.

You can add comments in the comments section and click on the  icon to add attachments.


Navigate to the location of your file by clicking **Browse**, select your file and then click the **Upload** button.

Note: Please ensure that the file name does not exceed 65 characters as it will fail.

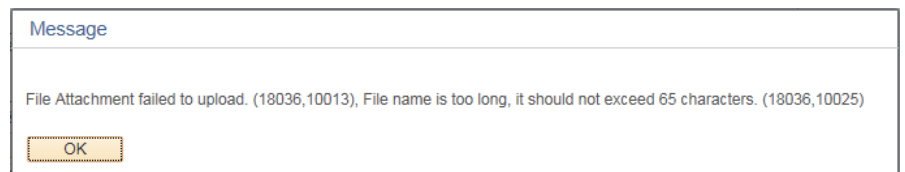
After the attachment has been successfully uploaded, click the  button.



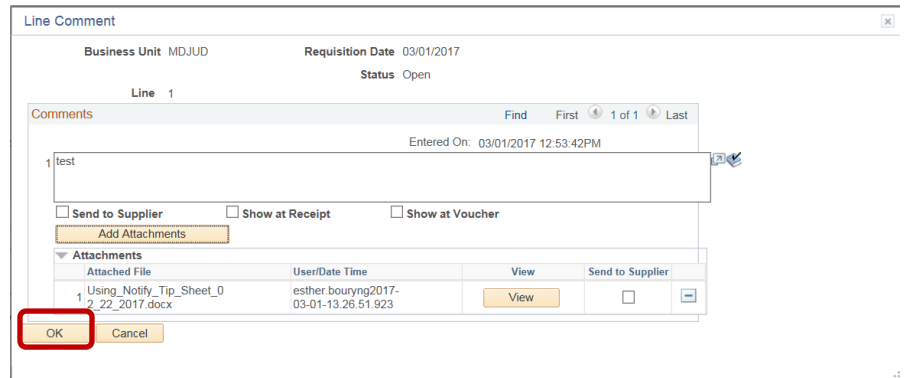
Line Comment dialog box showing Business Unit MDJUD, Requisition Date 02/15/2017, Requisition ID 000005636, Status Pending, Line 1. The Comments section has a text area with "Training materials to be delivered before 03/15/17". There are checkboxes for "Send to Supplier", "Show at Receipt", and "Show at Voucher", and an "Add Attachments" button. "OK" and "Cancel" buttons are at the bottom.




File Attachment dialog box with a "Browse..." button and "Upload" and "Cancel" buttons.



Message dialog box with the text: "File Attachment failed to upload. (18036,10013), File name is too long, it should not exceed 65 characters. (18036,10025)". An "OK" button is at the bottom.

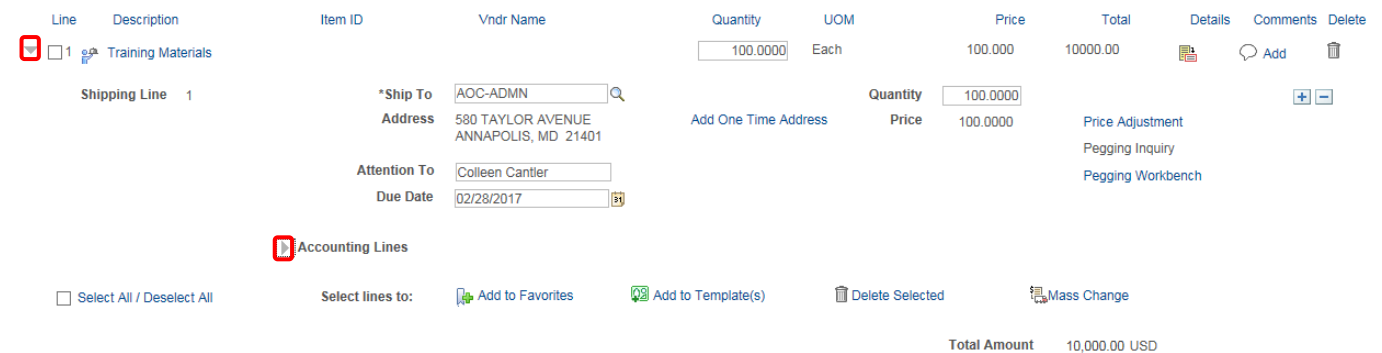


Line Comment dialog box showing Business Unit MDJUD, Requisition Date 03/01/2017, Status Open, Line 1. The Comments section has a text area with "test". There are checkboxes for "Send to Supplier", "Show at Receipt", and "Show at Voucher", and an "Add Attachments" button. Below is an "Attachments" table:



Attached File	User/Date Time	View	Send to Supplier
1 Using_Notify_Tip_Sheet_02_22_2017.docx	esther.bouryng2017-03-01-13:26:51.923		<input type="checkbox"/>

"OK" and "Cancel" buttons are at the bottom. The "OK" button is highlighted with a red box.

11.



Main requisition screen showing a table with columns: Line, Description, Item ID, Vndr Name, Quantity, UOM, Price, Total, Details, Comments, Delete. The first line is "Training Materials" with Quantity 100.0000, UOM Each, Price 100.000, Total 10000.00. Below the table, there are sections for Shipping Line 1, Accounting Lines, and a bottom bar with buttons: Select All / Deselect All, Select lines to:, Add to Favorites, Add to Template(s), Delete Selected, Mass Change, and Total Amount 10,000.00 USD.

Click on the  icon near **Line**. Then click on the  icon to the left of **Accounting Lines**.

12.

Click on the tab **Chartfields 2** to view your chartfields.

Accounting Lines

*Distribute By Qty

SpeedChart

Accounting Lines

Chartfields1Chartfields2DetailsDetails 2Asset InformationAsset Information 2Budget Information

Line	Status	Dist Type	*Location	Quantity	Percent	Merchandise Amt	GL Unit	Entry Event
1	Open		JIS - MAIN	100.0000	100.0000	10,000.00	MDJUD	

13.

If you need to change the PCA on the Req. line, you can do that by entering the PCA in the **SpeedChart** field. If you change the PCA, you'll have to re-enter the **Approp Yr**.

Special Requests

Enter information about the non-catalog item you would like to order.

Item Details

*Item Description Training Materials

*Price100.0000

*Quantity100.0000

*Category0819

Accounting Lines

*Distribute By Qty

SpeedChart

Accounting Lines

Chartfields1Chartfields2DetailsDetails 2Asset InformationAsset Information 2Budget Information

Batch	PCA	Fund	Account	Program	Approp Number	Approp Year	Dept	PC Bus Unit	Project
C25	90001	0001	0819	B009	A0009	AY2017			

Select lines to: Add to FavoritesAdd to Template(s)Delete SelectedMass Change

The Account field is populated based on the category you've chosen. You cannot change the account # on this panel. If you need to change the account, you can click on the line description (seen below) and then change the category, which will then default in a new Account value based on the newly selected Category.

Cart Summary: Total Amount 10,000.00 USD

Expand lines to review shipping and accounting details


Requisition Lines












Line	Description	Item ID	Vndr Name
1	Training Materials		

Select All / Deselect All

Select lines to: Add to Favorites

14.

Click the  **Save & submit** link at the bottom of the page.

<div>15.</div>	<div><div>On the Confirmation page, you'll see your Requisition number.</div><div>Budget Check your Req. by clicking on the link  Check Budget .</div><div>You'll see a  processing graphic on the top right side of your screen.</div></div>	<div><div>Confirmation</div><div>Your requisition has been submitted.</div><div><div>Requested ForColleen Cantler</div><div>Requisition NameAY17 Sharp Maint. Review</div><div>Requisition ID0000005636</div><div>Business UnitMDJUD</div><div>StatusPending</div><div>PriorityMedium</div><div>Budget StatusNot Checked</div></div><div><div> View printable version</div><div> Edit This Requisition</div><div> Check Budget</div></div><div><div>JIS Approvals</div><div><div>AY17 Sharp Maint. Review:Pending</div><div><div>JIS Approvals</div><div><div>Pending</div><div>Multiple Approvers JIS Level 1 Approver</div></div><div><div>Not Routed</div><div>Multiple Approvers JIS Level 2 Approver</div></div><div><div>Not Routed</div><div>Multiple Approvers Dept of Budget Approver</div></div></div><div><div>Apply Approval Changes</div></div><div><div> Create New Requisition</div><div> Manage Requisitions</div></div></div></div></div>
<div>16.</div>	<div><div>Once the Budget Check completes, verify that you Budget Status is Valid.</div><div>Depending on the rules that apply to your area, your Requisition will be routed for the necessary Approvals. You'll receive email notifications and Worklist Items in your Worklist when:</div><div><div>1. Your Requisition has been Approved.</div><div>2. The PO associated with your Req. is Dispatched to the Vendor.</div></div></div>	<div><div>Confirmation</div><div>Your requisition has been submitted.</div><div><div>Requested ForColleen Cantler</div><div>Requisition NameAY17 Sharp Maint. Review</div><div>Requisition ID0000005636</div><div>Business UnitMDJUD</div><div>StatusPending</div><div>PriorityMedium</div><div>Budget StatusValid</div></div><div><div> View printable version</div><div> Edit This Requisition</div></div><div><div>JIS Approvals</div><div><div>AY17 Sharp Maint. Review:Pending</div><div><div>JIS Approvals</div><div><div>Pending</div><div>Multiple Approvers JIS Level 1 Approver</div></div><div><div>Not Routed</div><div>Multiple Approvers JIS Level 2 Approver</div></div><div><div>Not Routed</div><div>Multiple Approvers Dept of Budget Approver</div></div></div><div><div>Apply Approval Changes</div></div><div><div> Create New Requisition</div><div> Manage Requisitions</div></div></div></div></div>



End of Document

This document is intended to provide a quick reference to completing standard transactions within GEARS. Please refer to the appropriate User Procedures and/or online references for any corresponding policies regarding this process.